



# - Draft - Working Paper

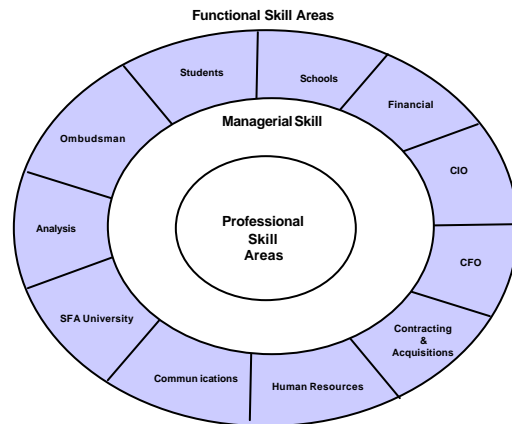
## Financial Partners Skill Catalog

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### *Financial Partners Channel*

#### ***Functional Skills List:***

- ☐ Contract Management
- ☐ Office Administration
- ☐ Oversight and Compliance
- ☐ Payments Processing
- ☐ Planning and Budgeting
- ☐ Risk Modeling
- ☐ Technical Assistance
- ☐ Technology Planning





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### Contract Management

*Manages and monitors operating partners performance in accordance with government policies and procedures.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of the contract management vision of SFA
- Applies contract management vision to develop, sustain and improve relations with contractors/vendors in order to meet SFA’s objectives
- Demonstrates understanding of federal contract management concepts, procedures and regulations
- Ensures compliance with government contracting regulations
- Demonstrates ability to develop, manage and monitor effective memorandums of understanding with vendors and third party service providers
- Demonstrates skill in working with vendors to lower costs associated with technology and processes
- Demonstrates ability to monitor progress and ensures vendor/contractor adheres to standards and expected outcomes

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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### Office Administration

*Performs administrative practices and support services to increase office effectiveness and efficiency.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates ability to organize, plan and coordinate administrative functions
- Demonstrates ability to identify administrative procedural problems and recommend improvements that increase effectiveness and efficiency
- Uses knowledge of administration concepts and practices (answering phones, filing, scheduling, etc.) to plan, deliver and manage support services vital to SFA operations

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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### Oversight and Compliance

*Applies understanding of oversight and compliance program guidelines and regulations to examine, measure, and monitor program procedures and finances.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard :

- Demonstrates an understanding of SFA’s oversight role
- Demonstrates an understanding of oversight and compliance program guidelines and regulations
- Applies program guidelines and regulations to examine, measure and monitor program participation procedures and finances to ensure compliance

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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### Payments Processing

*Prepares, compiles and analyzes financial transaction data for payment processing.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of payment process
- Demonstrates ability to monitor and respond to issues throughout payment process
- Demonstrates ability to write queries to prepare and compile financial transaction data and analyze trends to advise senior management
- Demonstrates ability to initiate and maintain program and system changes to electronic Financial Management System (FMS)

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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### Planning and Budgeting

*Uses rules, appropriate information sources and tools to ensure accurate and timely reporting of business forecasts and budgets.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of OMB regulations and overall Federal appropriations process
- Demonstrates understanding of rules, information sources and tools available to prepare and consolidate budgets and forecasts
- Demonstrates understanding of departmental and organizational budget formulation and fund control procedures and guidelines
- Demonstrates ability to apply planning and budgeting concepts ensuring accurate and timely reporting of business forecasts and budgets
- Analyzes and discusses budget implications
- Demonstrates ability to track and reconcile unit budget activities

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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### Risk Modeling

*Applies understanding of the concept and organization value of risk modeling to prevent and reduce losses arising from high-risk ventures.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of the concept and organizational value of risk modeling
- Demonstrates ability to develop systematic and comprehensive risk modeling programs that detect, prevent and reduce losses arising from high risk ventures

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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### Technical Assistance

*Applies customer support principles to respond to customer inquiries. Develops and implements training and educational programs to meet customer needs.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of impact of customer support on customer satisfaction and applies appropriate customer support principles related to SFA software and systems
- Demonstrates skill in providing complete, accurate and real-time support to customer inquiries about SFA software and systems
- Identifies customer needs and develops and implements appropriate training or educational programs to serve the customer

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.





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## Financial Partners Skill Catalog

### Technology Planning

*Applies understanding of strategic IT goals and initiatives to identify service improvement and cost reduction opportunities.*

#### Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of strategic IT goals and objectives
- Demonstrates ability to apply strategic investment priorities to select IT initiatives that best support organizational goals and objectives
- Demonstrates understanding of IT initiative evaluation process
- Evaluates business process and technical requirements to identify service improvement and cost reduction opportunities
- Monitors emerging technologies and business process innovations to analyze their potential for streamlining SFA operations

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#### Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.